

# User Guide

## NHER Plan Assessor Version 5.4.2 – new features

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This User guide gives step by step instructions on how to use the new features in Plan Assessor 5.4.2

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## Development and house type

We have introduced two new data fields in order to help organise the records in your database.

### Development

This is set when entering Assessors and Clients in the Admin screen. The Admin screen is available from the WELCOME screen when you open Plan Assessor or by selecting 'Change database' from the file menu when Plan Assessor is open.

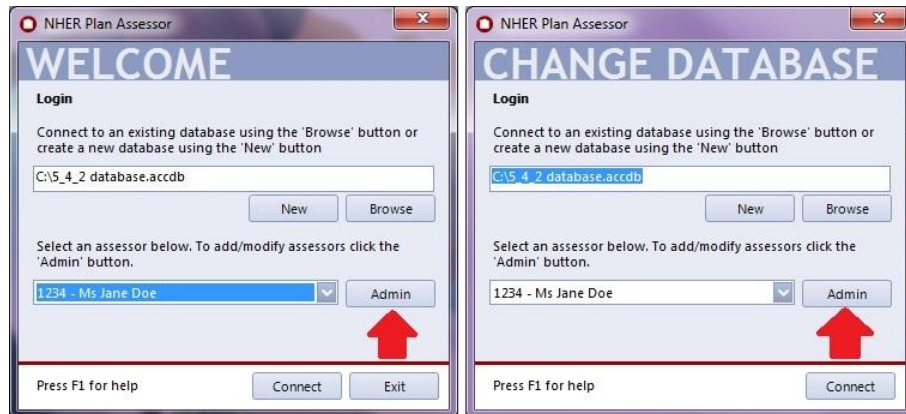


Figure 1 accessing the Administration screen

In the Administration screen, select 'Developments' and 'Add', enter the name of the development (a number will be automatically assigned), this can be edited at a later date if required.

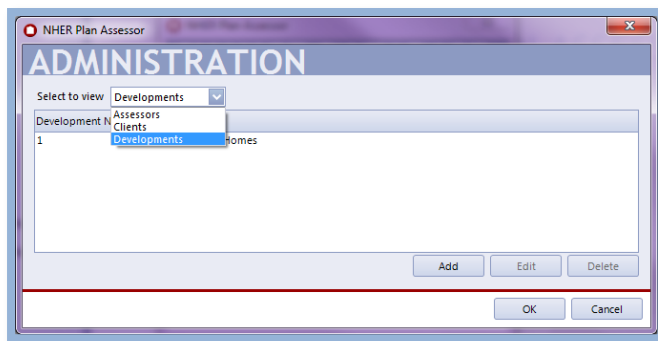


Figure 2 adding a Development

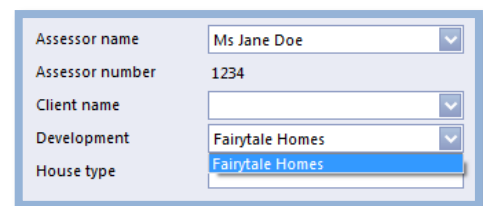


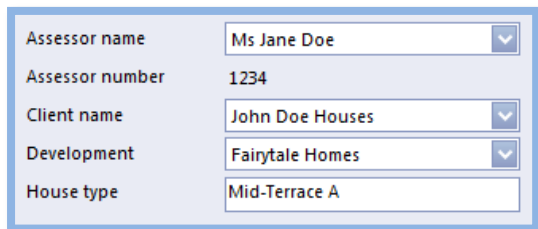
Figure 3 assigning a Development to a record

The Developments entered are then available to assign records to, in the Development drop down on the JOB DETAILS screen.

The Development field is available as one of the Filter options in both the OPEN screen and the BATCH MANAGER screen (for all/unallocated records). This should help when identifying records for mass updates and multiple compliance reports.

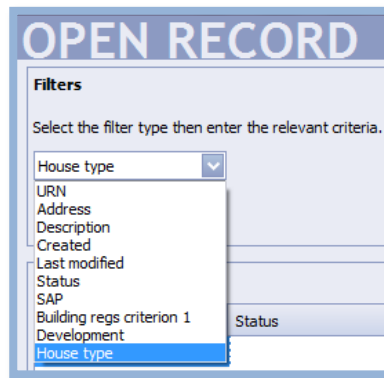
## House type

This is a 'free text' field available on the JOB DETAILS screen that allows you to further differentiate your records within the database. The House type field is available as one of the Filter options in both the OPEN screen and the BATCH MANAGER screen (for all/unallocated records).



Assessor name: Ms Jane Doe  
 Assessor number: 1234  
 Client name: John Doe Houses  
 Development: Fairytale Homes  
 House type: Mid-Terrace A

Figure 4 entering House Type



**OPEN RECORD**

**Filters**

Select the filter type then enter the relevant criteria.

House type  
 URN  
 Address  
 Description  
 Created  
 Last modified  
 Status  
 SAP  
 Building regs criterion 1  
 Development  
 House type

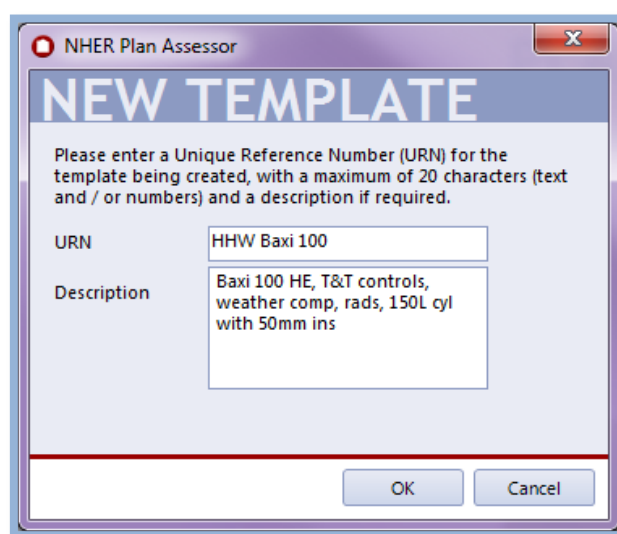
Figure 5 Filter on House type or Development

## Heating and hot water templates

### Creating

The heating and hot water template allows you to create a specification for a heating and hot water system and then apply the template to individual records or across many records.

There is a new Templates menu, this menu is only available when there are no records open. To create a new template select 'New → Heating and hot water' from the Templates menu. In the NEW TEMPLATE screen give the template a URN and a Description. We have pre-filled the first 3 characters of the URN with HHW, to help distinguish between heating /hot water templates and any other templates we introduce in future versions.



**NHER Plan Assessor**

**NEW TEMPLATE**

Please enter a Unique Reference Number (URN) for the template being created, with a maximum of 20 characters (text and / or numbers) and a description if required.

URN: HHW Baxi 100  
 Description: Baxi 100 HE, T&T controls, weather comp, rads, 150L cyl with 50mm ins

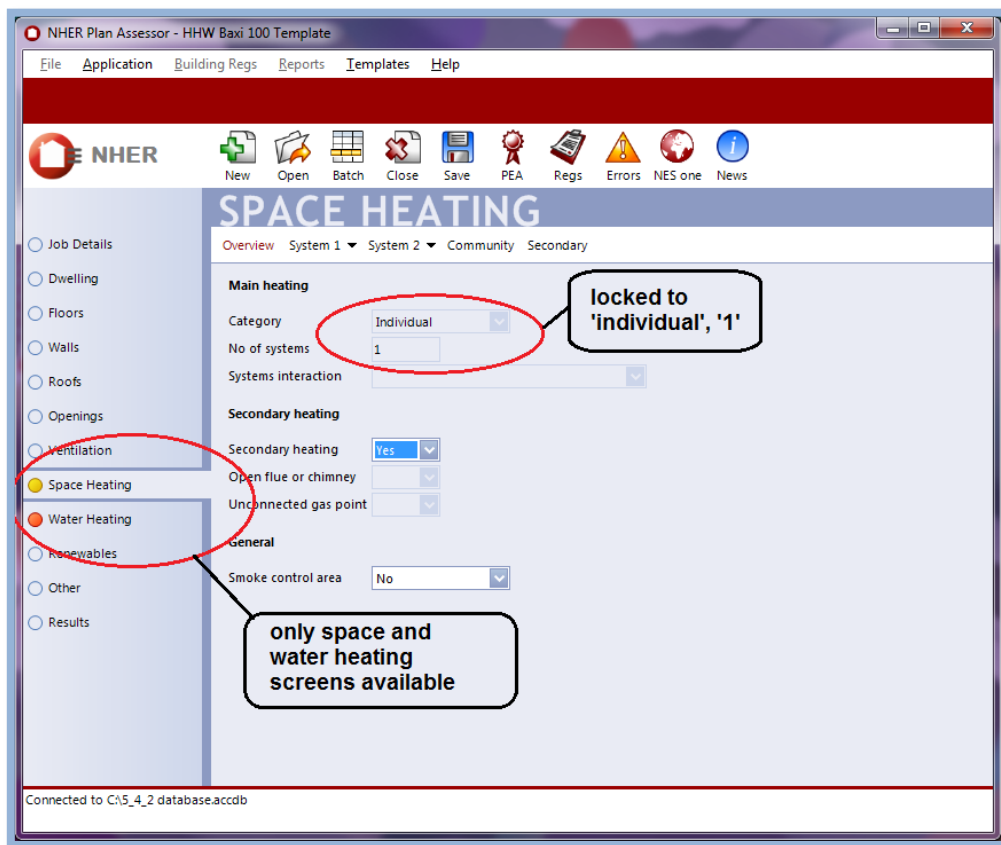
OK Cancel

Figure 6 creating a new template

Clicking 'OK' will open up the Plan Assessor template screens, these are essentially the main Plan Assessor program with only the Space Heating and Water Heating screens available. The HHW template is currently only available for use with one individual system, not community heating or more than one main heating system.

**Note:** If a template is open, selecting the 'New' icon will open the NEW TEMPLATE dialogue.

Enter the data as normal into the space heating screens; you can enter as much or as little data as you require, you may want to create a template with heating details only. **Any details left blank in the template will be blank when the template is applied.** For example if you only enter the space heating details and apply the template to a record with hot water details already populated, the hot water details will be overwritten with the blank fields. If a full HHW data set has been entered the traffic lights will be green.



Use the Save icon to save the template. The template will be saved in the current database. It will then be available to select and apply to any record.

**Note:** A template cannot be created with an exhaust air heat pump, due to the interaction between the ventilation system and the selected heat pump. A record with an exhaust air heat pump can also not have template applied. We hope to introduce this in a future version.

## Editing/opening/saving a template

To edit a template, select Open from the Template menu or if a template is already open select the 'Open' icon. This will bring up the OPEN TEMPLATE grid, select the required template and click OK. The template can then be saved using the 'Save' icon or selecting Save from the Template menu. You can also choose to Save as New Template in the Template menu.

**Note:** if you edit a template after it has been applied to a record, the changes will **not** be reflected in the record until you re-apply the template

## Delete a template

When there are no templates or records open select 'Delete' from the Templates menu to open the delete template dialogue. Highlight the selected record and click 'Delete'.

## Export / import template

To enable templates to be shared between databases, we have added export/import functionality. To export a template, open the template and select 'Export template' from the Templates menu. Save the .xml file to your desired location, the default location is C:/, with the URN as the default file name. To import a template, close any open templates or records and select 'Import template' from the Templates menu. If the template being imported has the same URN as one already in the database, you will be given the option to overwrite or update the URN. If import a template and want to change the description, select Save as new template and edit the description and URN.

## Applying a template

Templates can be applied to a batch of records or to an individual record.

### Individual records

To apply a template to an individual record, the record must be in 'draft' status.

- Navigate to the SPACE HEATING – Overview screen
- Select Category 'Individual'
- Enter No of Systems '1'
- Select the required template from the Template drop down ( the description of the template will be displayed underneath to enable you to select the correct template)
- Click Apply Template

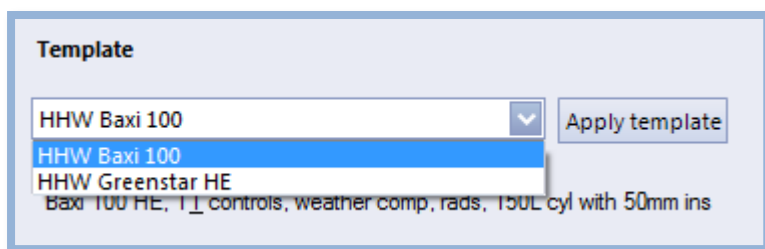


Figure 7 select template

**Note:** the Templates will not be available if the Category is 'Community' or the No of systems is '2'.

The Apply Template confirmation pop-up will appear to clarify any previously entered data on the Space or Water heating screens **WILL** be overwritten.

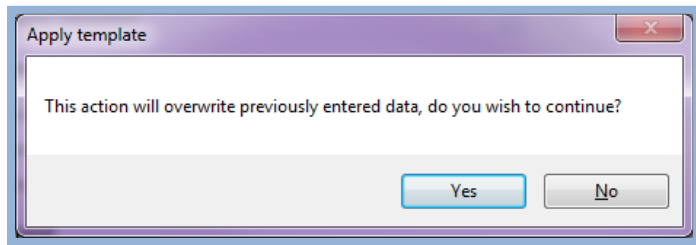


Figure 8 apply template confirmation

If the record has solar water heating with a combined solar store and a template is applied, a different confirmation message will appear. This warns that overwriting the water heating details could cause the record not to process. i.e. if the template has no cylinder. Select Yes to finish applying the template.

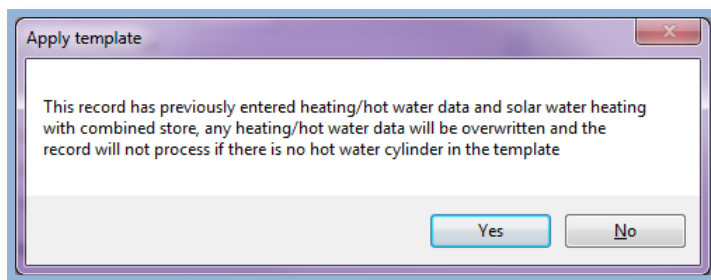


Figure 9 apply template confirmation when the record has a combine solar store

The URN of the applied template will be displayed in bold beneath the Template field to confirm that the template has been successfully applied.

**Note:** as the space and water heating data can be edited AFTER applying a template, the details of the applied template only remains on screen until you navigate away from the page

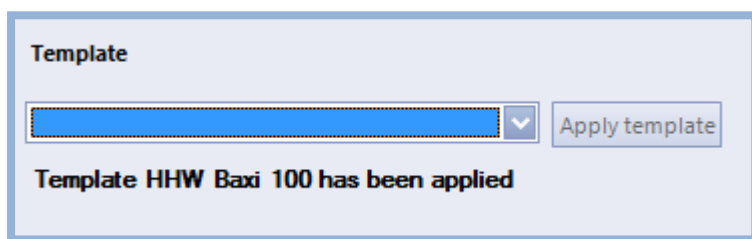


Figure 10 notification of the applied template



## Multiple records

To apply a HHW template across multiple records, open batch manager and select the required batch. With the required batch open, use the 'Views' button to select Heating /Hot Water, this will change the data displayed in the grid. **Note:** as template application applies only to draft records with a single individual heating system, no community, multiple heating system or finalised records will be displayed.

The views have been introduced to assist in selecting the correct records for updating data across multiple records and to make it easier to confirm that the template has been applied to the selected records.

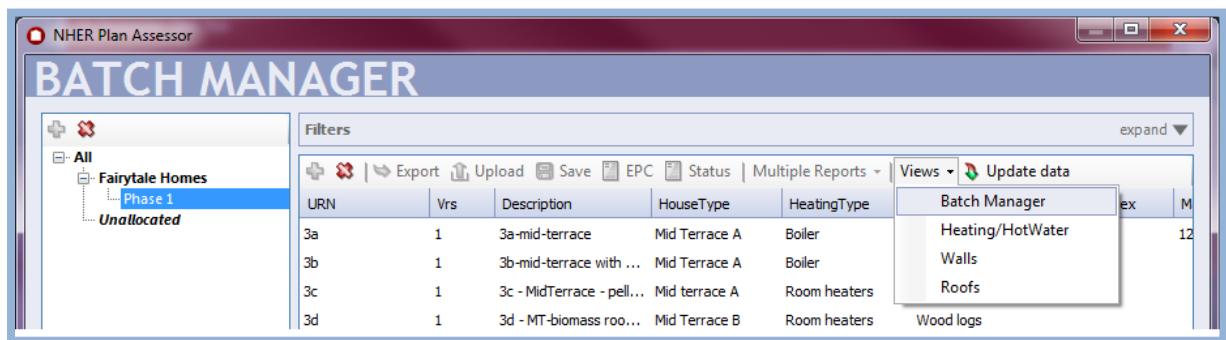
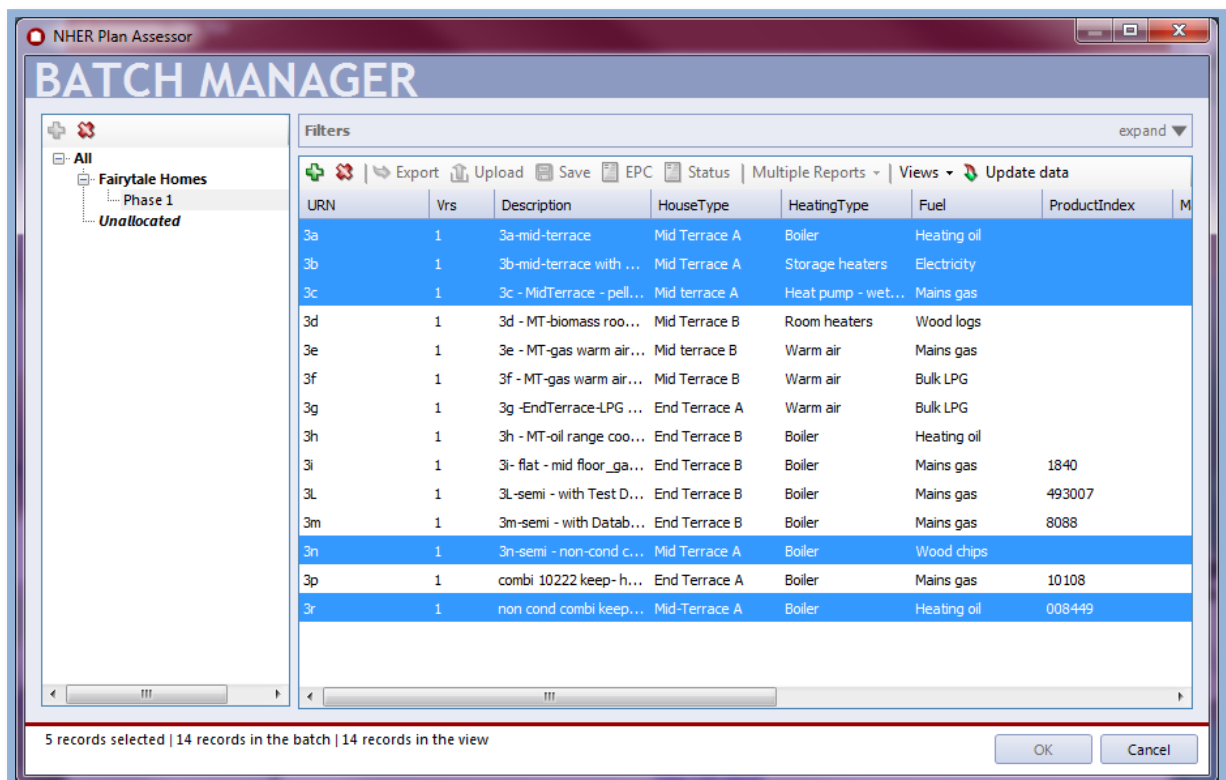


Figure 11 selecting a view in batch manager

Use ctrl-click to select the records required for updating. In the screenshot below we have selected all the records with house type Mid Terrace A.



Click on the Update data icon and this will bring up the APPLY TEMPLATE dialogue; select from the available templates.

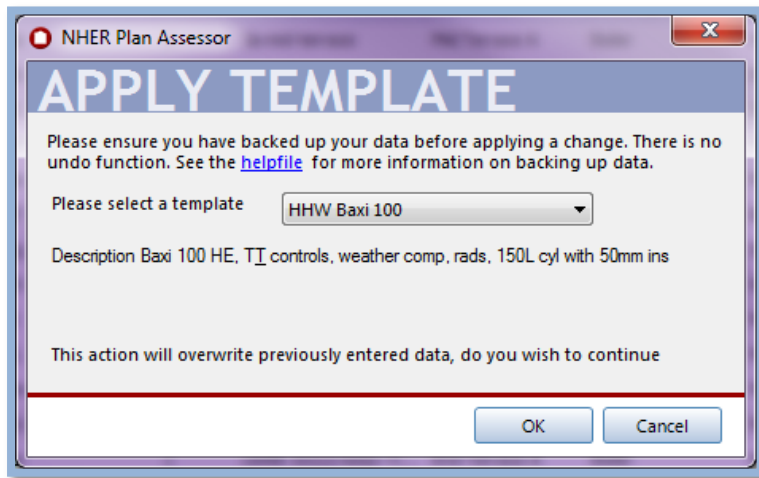


Figure 12 apply template in batch manager

Clicking OK will display the apply template dialogue, this confirms the number of records being updated and re-iterates there is **no undo function**.

If the update is unsuccessful the information dialogue will appear, highlight the record to see the full description of the error.

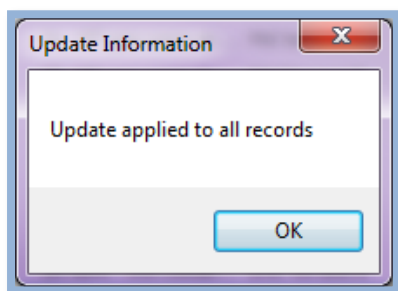


Figure 13 apply template successful

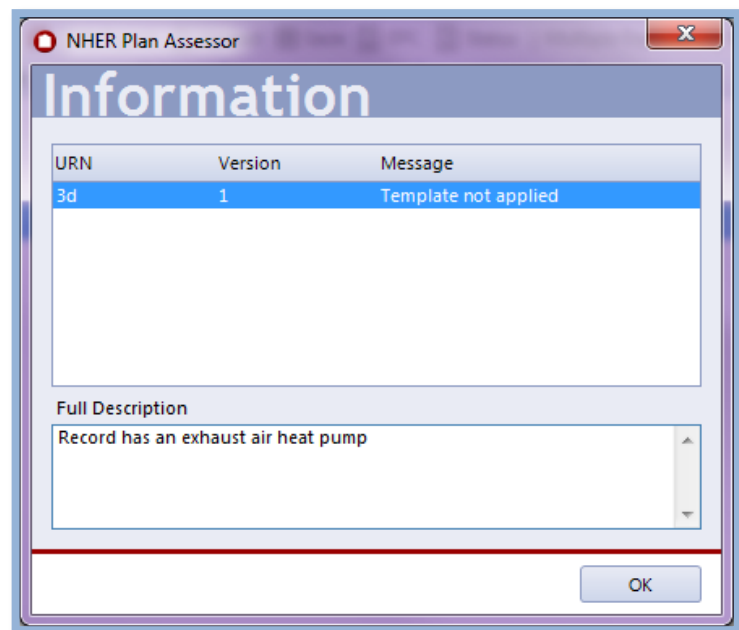


Figure 14 apply template unsuccessful



After successfully applying a template the selected records now display the updated heating data in the HHW view:

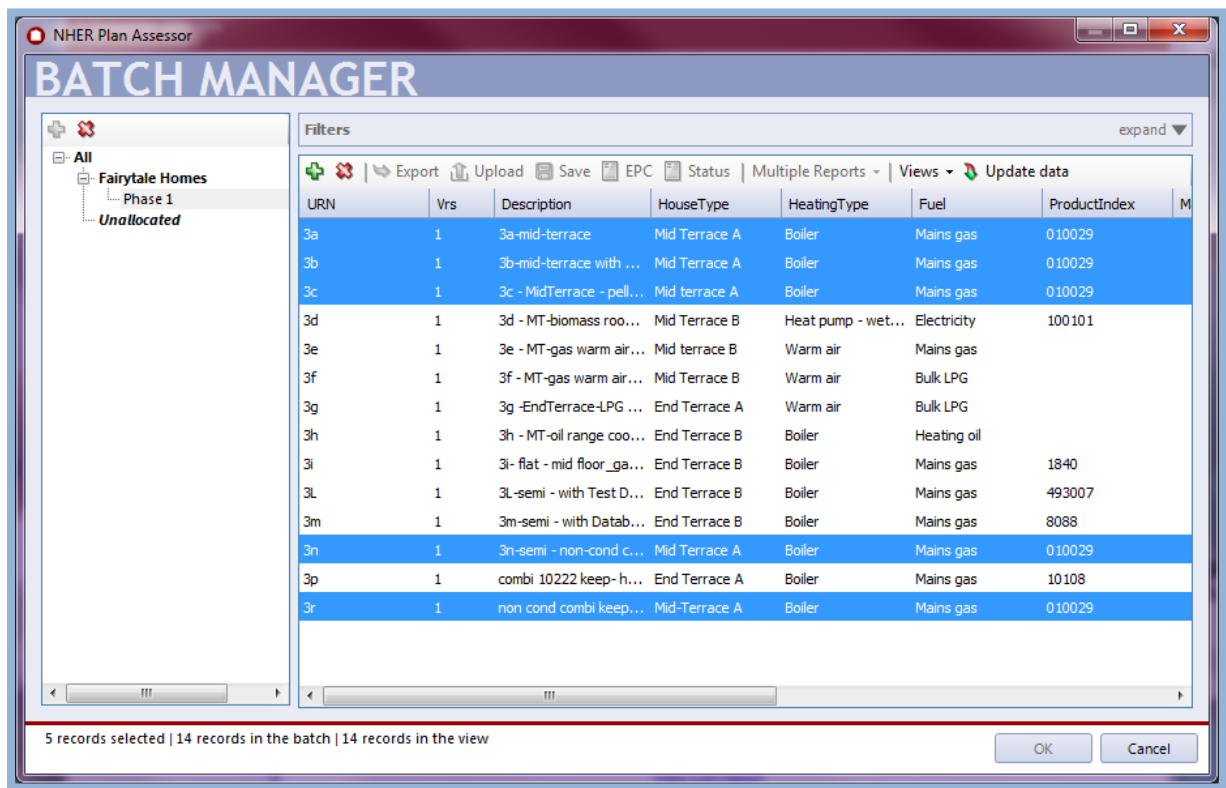


Figure 15 updated view following applying a template

## Updating U-values of walls/roofs

We have introduced the facility to update the U-value of walls or roofs across multiple records.

### The 'Ref' field

To order to enable this functionality we have introduced a reference number to each wall or roof entered. When you add a new wall (or roof) you will see the Ref field is pre-populated and un-editable with Wall 1(or Roof 1). The description field remains for you to add your own description of the construction.

On an existing database that has been updated through the database converter the Ref field is automatically populated and the old 'Name' is now used for the Description.

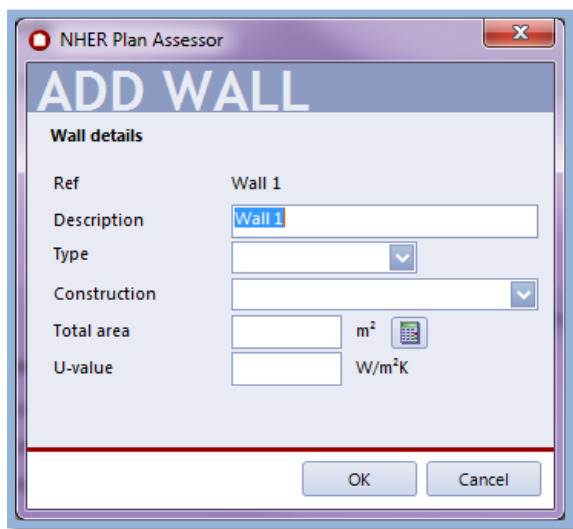


Figure 16 add wall dialogue

### Multiple record update (walls)

To amend a wall U-value in multiple records, open batch manager and select the required batch. With the required batch open, use the 'Views' button to select Walls, this will change the data displayed in the grid to view only the walls data associated with each record.

**Note:** U-values can only be updated across many records when they are in draft status, so only draft records will be displayed.

The walls view displays the wall description and U-value of the walls of each record in the batch.

They are organised in columns using the Ref field, i.e. all Ref : Wall1 come first, use the scroll bar to view all walls available for updating.

**Note:** It is important to use the Description field consistently i.e. 100mm cavity etc, to make the best use of the views.

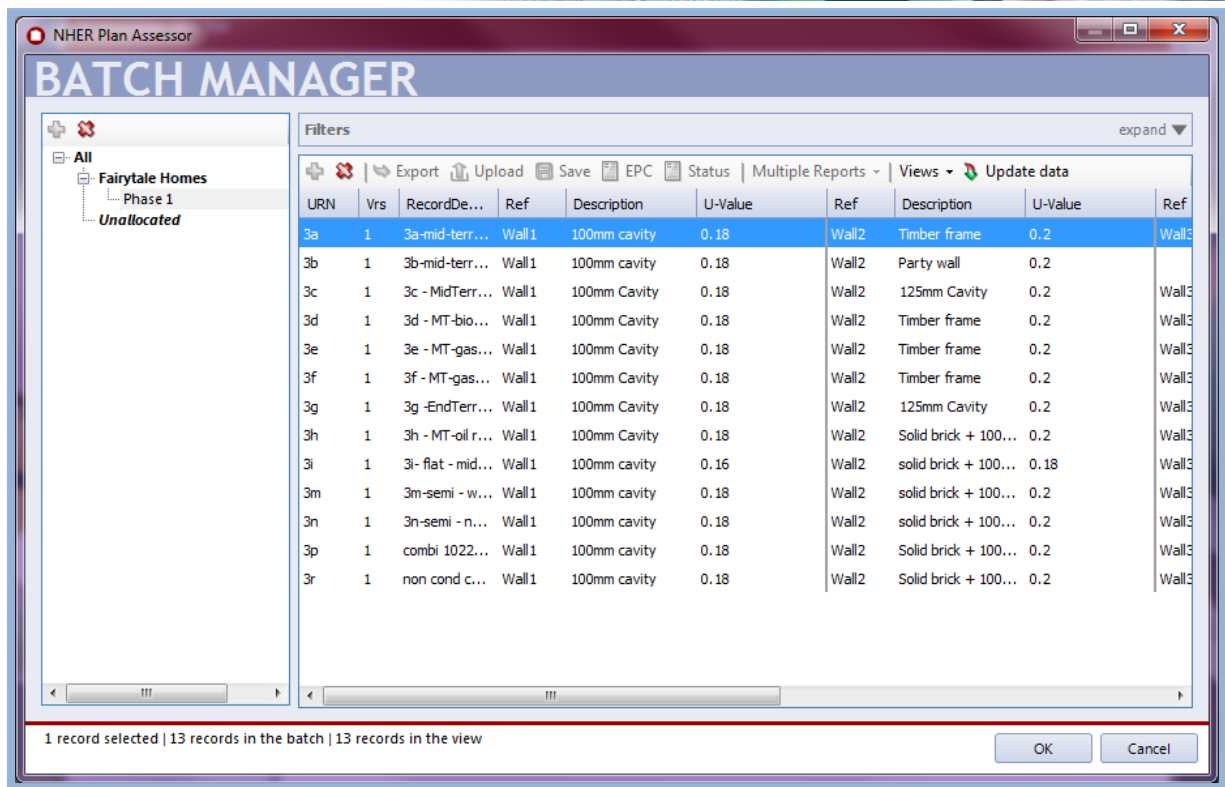


Figure 17 walls view in batch manager

Use ctrl-click to highlight the records with the wall that requires updating and then click on the update data icon.

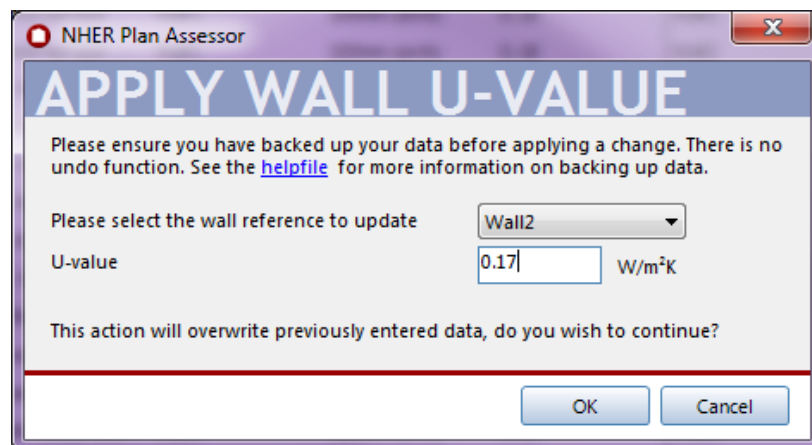


Figure 18 apply wall U-value dialogue

Select the wall from the drop down list, in this example the solid brick + 100mm are being updated. Only one reference wall can be updated at a time (another reason to organise the data entry). If you have walls with different reference number (i.e. wall1 and wall2) that require updating, you will need to first update the Wall1s and then the Wall2s. Type in the U-value and click OK. You will then be asked to confirm:

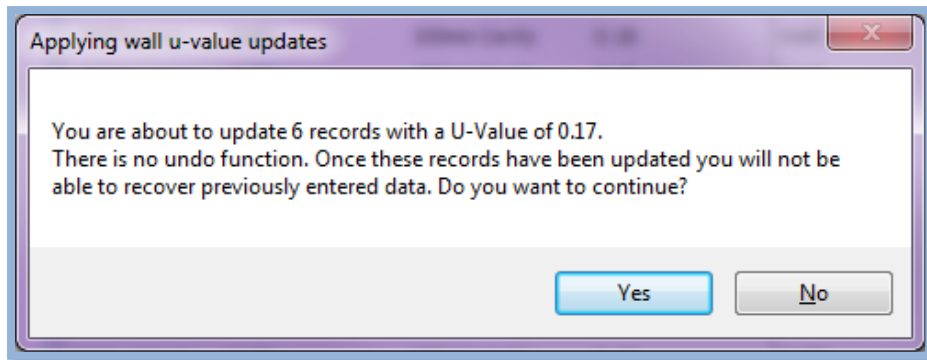


Figure 19 apply wall U-value confirmation

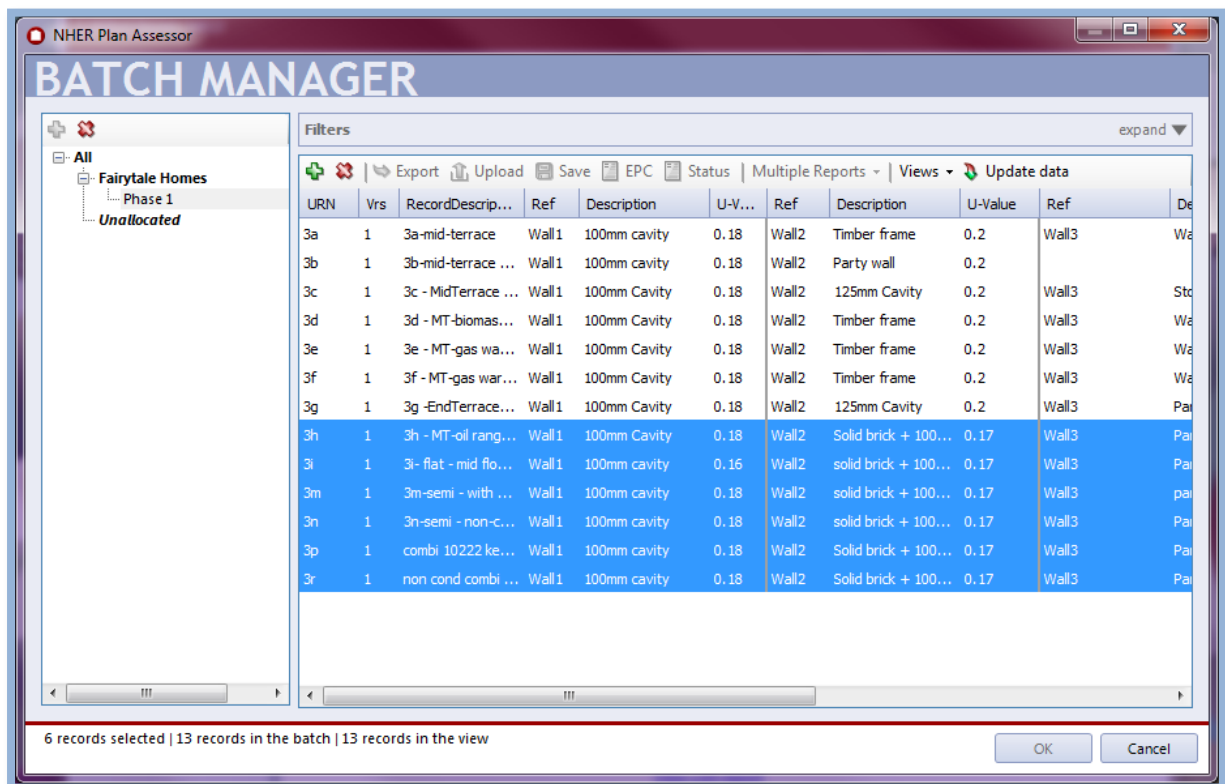


Figure 20 walls grid with U-values updated

### Multiple record update (roofs)

To update/change the U-value of a roof across multiple records, follow the same procedure as for walls, but select 'Roofs' from the views menu.